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UNIVERGE SV8100

MyCalls Call Centre Installation Manual

Version 1.4

Document History

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First release

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Update PC Specifications
Update Agent Control Toolbar operation.

Revision 1.3 August 2009

Revision 1.4 Jan 2011
Update for MyCalls version 3.0.0.0

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Product Description

MyCalls Call Centre

MyCalls Call Centre provides real time monitoring of an SV8100 with ACD working. ACD works on a concept on agents logging into ACD groups to take calls. The longest waiting call in an ACD group is delivered to the agent that has been idle to longest. MyCalls Call Centre can show in real time the status of ACD queues and agents. Detailed reports can be produced on agent and ACD group performance.

MyCalls Agent Control

MyCalls Agent Control provides a major enhancement to MyCalls Call Centre. With agent control, you can use the MyCalls application to login to ACD to take calls. Unavailable codes can be setup so that when an agent will not be taking calls, they can specify a reason why. An ACD supervisor will have the ability to control the status of multiple agents. In addition to the MyCalls Call Centre Reports, there are additional reporting features available in MyCalls Agent Control.

This manual is intended to give an installer with an understanding of MyCalls and SV8100 ACD the ability to install and configure MyCalls Call Centre.

Requirements

An SV8100 telephone system using system software version 5.0 or greater. For ACD to work an appropriate number of ACD Client licenses should be installed on the SV8100.

A TCP/IP connection to the SV8100 is required for the SMDR output, MIS Output and for the Agent Control Port.

Telephone System

MyCalls will run on an SV8100 PBX running version 5 system software or greater and version 5 of the PC programming tool.

MyCalls PC Specification

The MyCalls server is the PC that is responsible for communicating with the PBX and holding the MyCalls database. MyCalls clients can be installed that will retrieve information from the MyCalls server. A dedicated PC is strongly recommended for the MyCalls Server.

Minimum Hardware Specification

Intel Core i3 Processor or above
2GB RAM
Min 20GB of available Hard Disk Space

Operating systems:

Windows XP Pro min SP2 – 32 BIT only
Windows Server 2003 SP2 – 32 BIT only
Windows Vista Business, Ultimate and Enterprise 32 BIT only
Windows 7 Professional, Ultimate and Enterprise 32 and 64 BIT
Windows Server 2008 – 32 and 64 BIT

MyCalls is also supported on Terminal Services and Hyper V running on a Windows 2008 server*

*Call playback is not supported via terminal services / Remote Desktop.

Note that the PC spec for call recording and MyCalls enterprise are different, refer to the appropriate manual for further details.

Please note, the PC Specification for running in MyCalls Call Recorder and MyCalls Enterprise model are different, refer to the appropriate manual for further details.

You will need local administrator rights to the PC to install MyCalls.

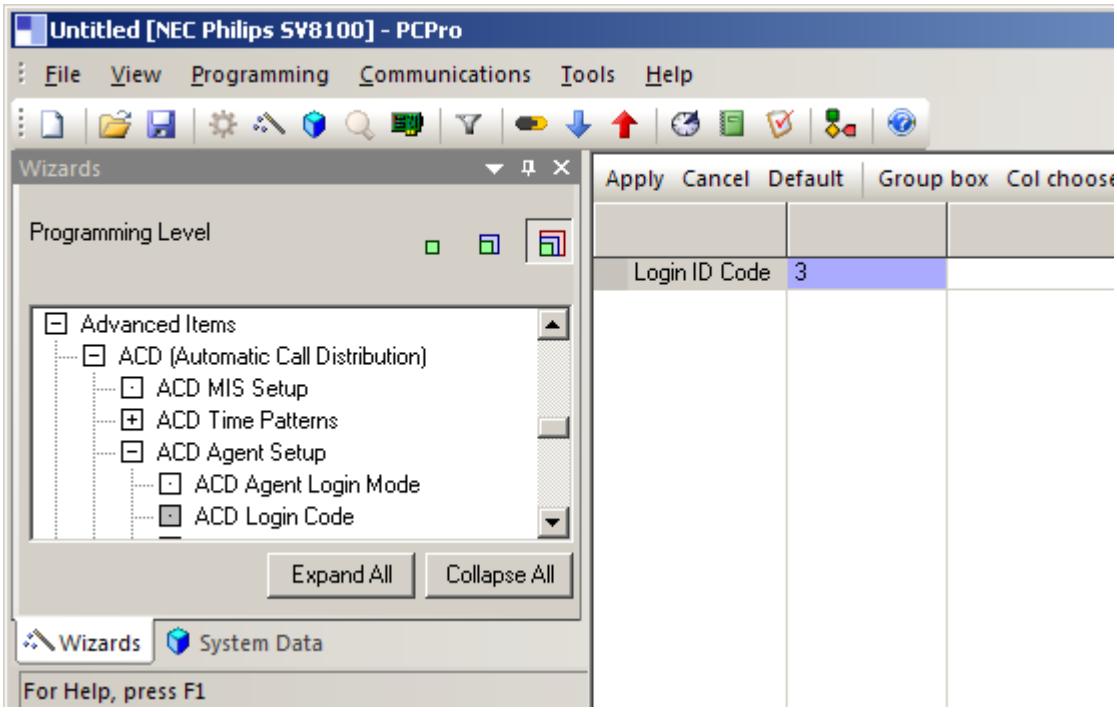
Agent Control requires a valid license containing the Agent Control feature to be installed on the SV8100.

MyCalls Call Centre

SV8100 Programming

The SV8100 should be programmed for ACD working refer to the ACD Installation manual for further details. The SV8100 should also be programmed for MyCalls. MyCalls will require the following item set in accordance with the existing ACD and MyCalls programming.

Wizards / Advanced Items / ACD (Automatic Call Distribution) / ACD Agent Setup / ACD Login Code. Set the number of digits an agent should enter to logon to ACD. This agent ID is used by MyCalls to identify the agent and does not have to match the extension number. The idea is where ever you logon using your agent ID, your call statistics will always be assigned to you.

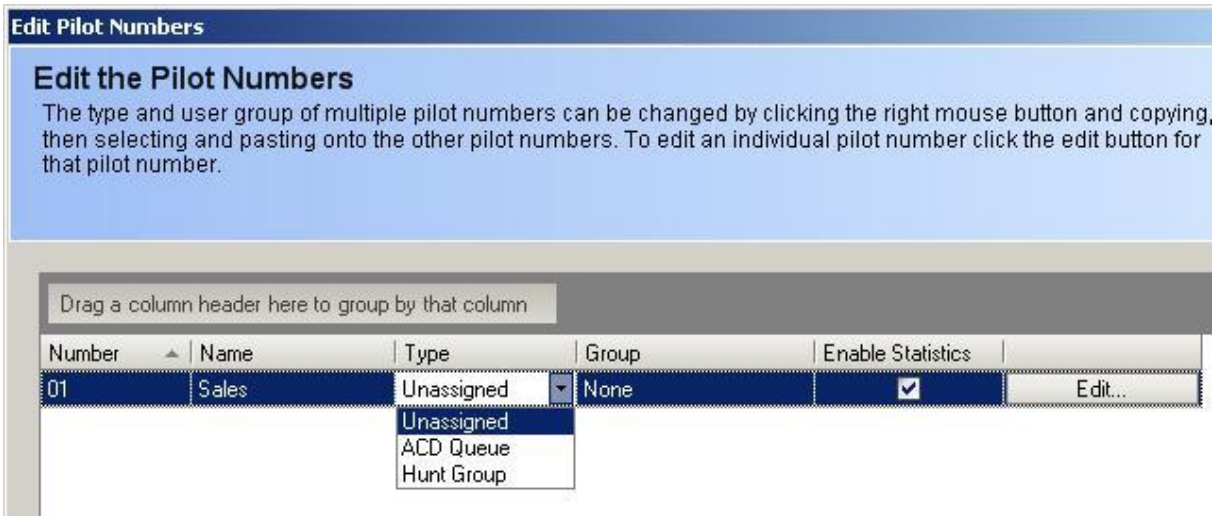


Configuring MyCalls

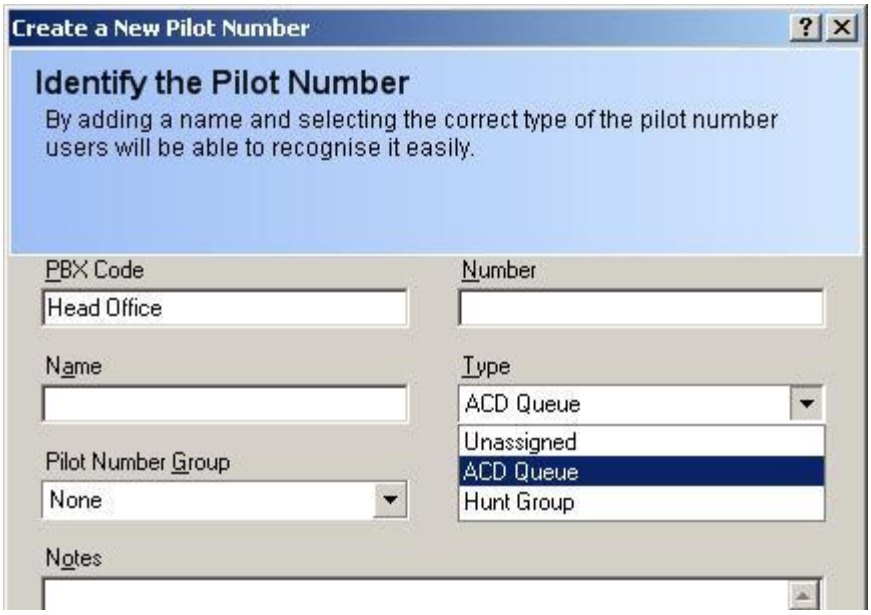
Configuring Pilot Numbers

Calls that are delivered to ACD groups are referred to as Pilot Numbers in MyCalls. Pilot numbers are displayed in MyCalls as a two digit number ranging from 01-64. If MyCalls sees calls to Pilot Numbers that is doesn't already know about, it will auto learn them and add them into MyCalls.

Any pilot numbers that are not auto learnt can be added manually. If MyCalls sees a call to a new pilot number that it does not know about, it will automatically add it into its configuration. Any pilot numbers that have been automatically added into MyCalls will need setting as ACD queues. In MyCalls, click Configure / Telephone System / Devices / Pilot Numbers / Create or edit. When editing the pilot numbers, you can assign ACD using the drop down menu in the Type column.


Edit Pilot Numbers
Edit the Pilot Numbers
The type and user group of multiple pilot numbers can be changed by clicking the right mouse button and copying, then selecting and pasting onto the other pilot numbers. To edit an individual pilot number click the edit button for that pilot number.
Drag a column header here to group by that column
Number
Name
Type
Group
Enable Statistics
01
Sales
Unassigned
None
Edit...
Unassigned
ACD Queue
Hunt Group

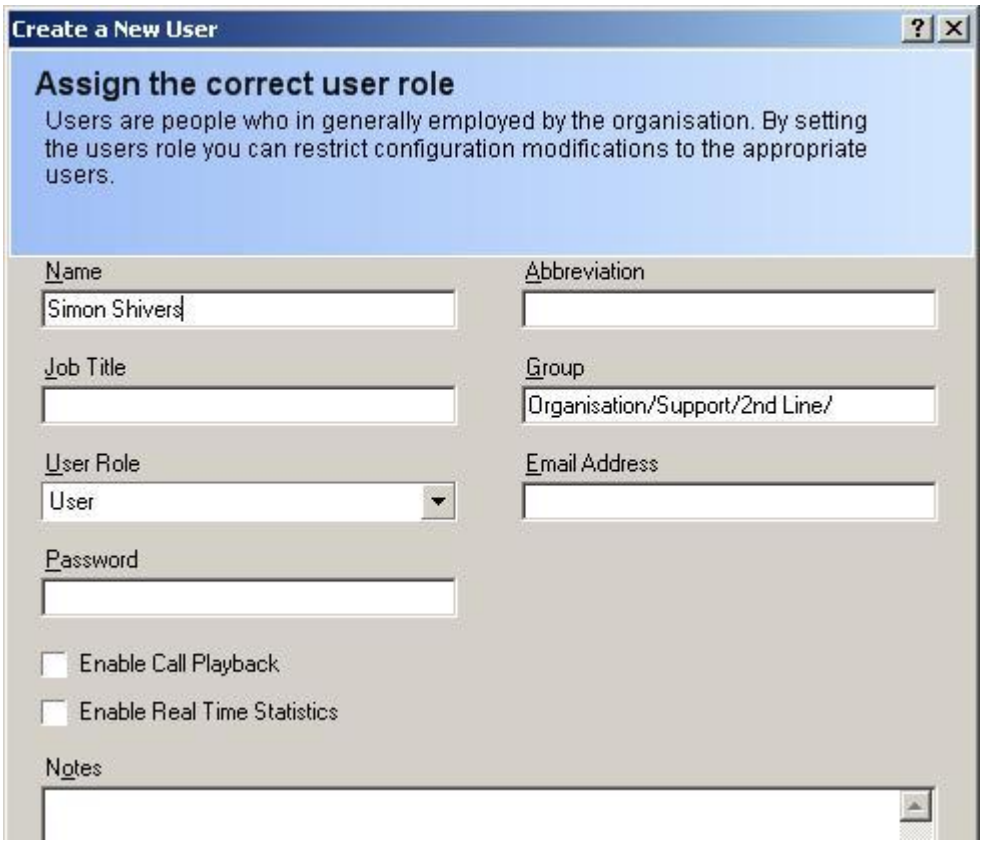
To manually add a pilot number, you can click 'Add new pilot number' in 'Edit Pilot Numbers' or click create a range of pilot numbers in Configure / Telephone System / Devices / Pilot Numbers. When adding the pilot numbers, make sure to set the type to ACD Queue.



Creating Users / Agents Using MyCalls

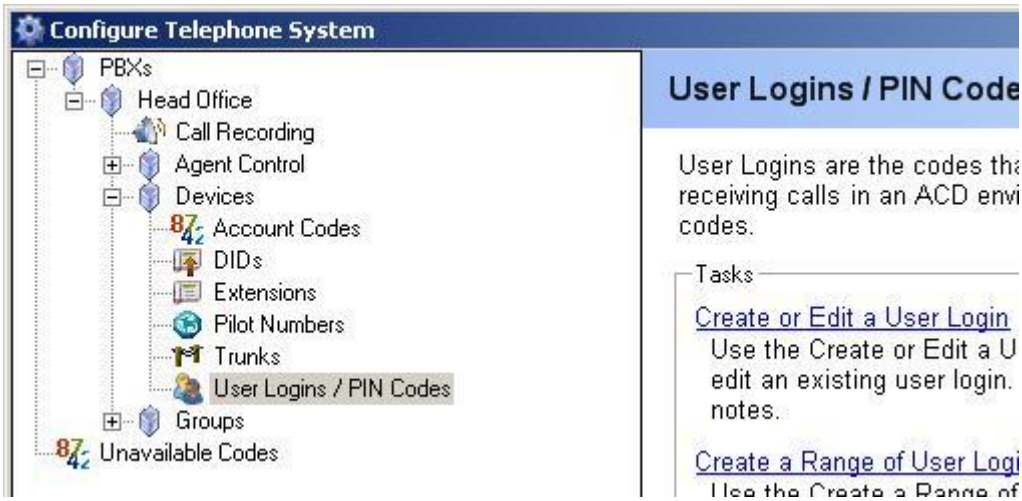
From the Configure / Organisation menu, typically here you would create groups that represent departments or common groups of agents. These groups can be used to create real time windows or for reporting purposes. Within the groups, if required, you can create sub groups to build up a tree type structure to represent departments within a company. Use the 'Create a New Group' option to create a group.

Once you have created a group, you need to create users within the groups. Select which group the user will belong to and click 'Create a New User.'

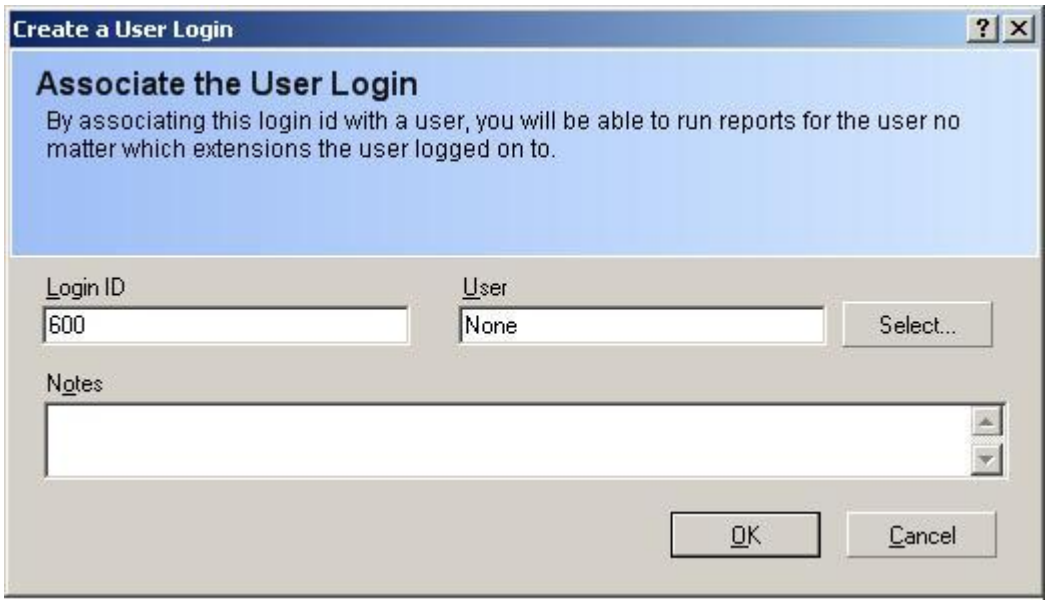


Enter the user details as required, the only mandatory field is the name field. Any number of uniquely named users can exist per organisation group. Enter a password if the user will be required to enter a password to login to MyCalls. The user role should be selected from the drop down menu, the user role defines the access level of the user within the MyCalls application. For a detailed description on which features are available to the different user roles refer to the version differences document accessible via the help menu in MyCalls. If MyCalls Call Recorder is being used, you can give the user permission to playback recorded calls by selecting 'Enable Call Playback.' If you wish to create real time views displaying statistics for the user the select 'Enable Real Time Statistics.'

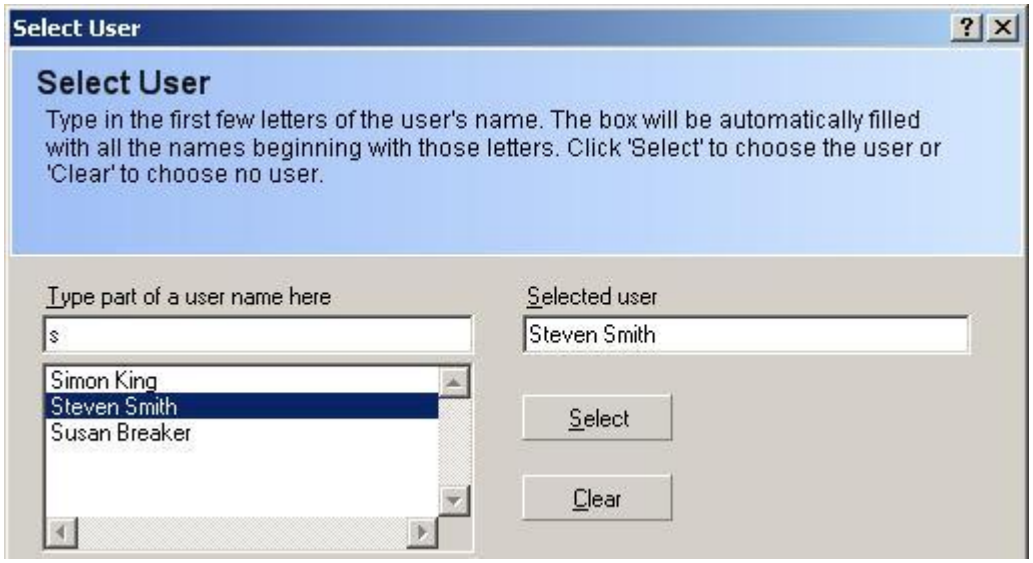
Once users have been created, they need assigning to a PIN number. The pin number is the code entered by an agent when they are prompted to 'Input Your ID' on the SV8100 Keyset. To assign a user to a pin number, go to Configure / Telephone System / Select the PBX / Devices / User Logins / PIN Codes. Click 'Create or Edit a User Login'



At the Edit User Logins screen, click ‘Add new User Login.’ In the Login ID, enter the digits that the agent uses to logon with.


Create a User Login
Associate the User Login
By associating this login id with a user, you will be able to run reports for the user no matter which extensions the user logged on to.
Login ID
600
User
None
Select...
Notes
OK
Cancel

Once the login ID is entered, click select to choose a user. In the ‘Type part of a user name here’ start to enter the name of the user and click on the user from the list of users displayed underneath. Click select and the user will appear in the ‘Selected user’ box. Click OK to save the settings.


Select User
Select User
Type in the first few letters of the user's name. The box will be automatically filled with all the names beginning with those letters. Click 'Select' to choose the user or 'Clear' to choose no user.
Type part of a user name here
s
Simon King
Steven Smith
Susan Breaker
Selected user
Steven Smith
Select
Clear

Click OK again to confirm the changes.

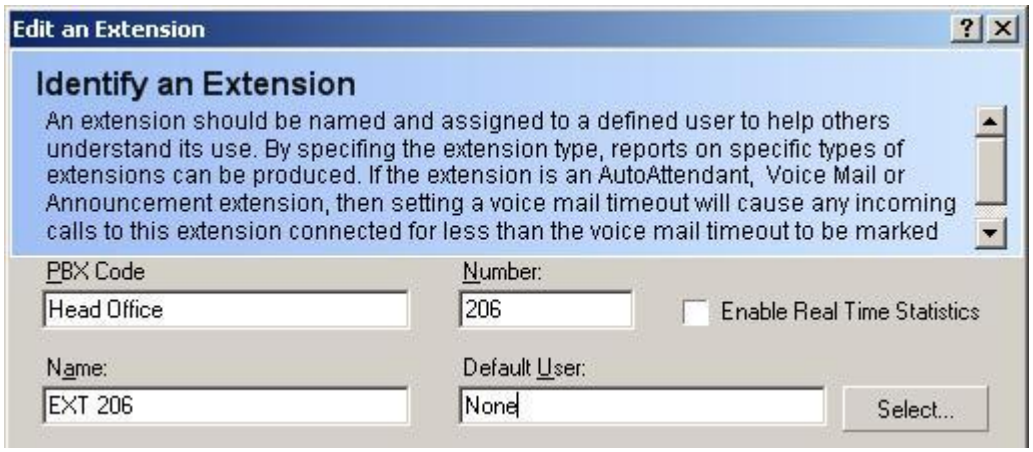
Create a User Login
Associate the User Login
By associating this login id with a user, you will be able to run reports for the user no matter which extensions the user logged on to.
Login ID
600
User
Steven Smith (Support/1st Line)
Select...
Notes
OK
Cancel

You will now return to the Edit User Logins screen, repeat the procedure for each ACD Agent that will logon.

Edit User Logins
Edit the User Logins
For each PBX there must exist set set of login identifiers. These can consis
letters. Each login identifier must be assigned to a User. A User may be as
one login identifier. This can be useful if Users log on to different PBXs bec
reports on Users will include calls wherever they may have logged on.
Drag a column header here to group by that column
Login ID
User
600
Steven Smith
Edit...
Add new User Login...

Once users have been created, they will need to logout and back into ACD in order for MyCalls to start reporting on the newly created agents.

Users can be optionally assigned to extensions, this is beneficial for when users use the same extension all of the time. To assign an extension to a user go to Configure / Telephone System / PBX / Devices / Extensions / Create or Edit Extensions. Click the select button next to the Default User box.

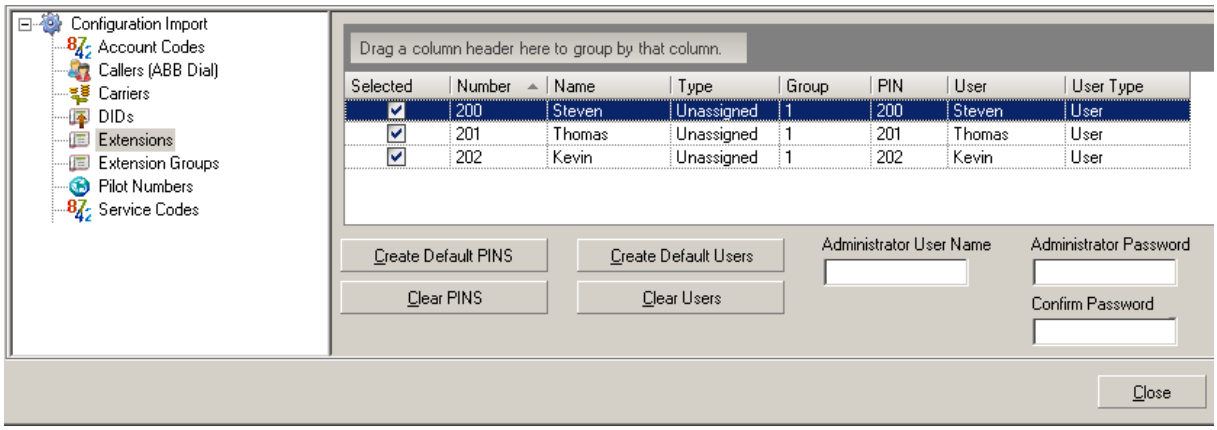

Edit an Extension
Identify an Extension
An extension should be named and assigned to a defined user to help others understand its use. By specifing the extension type, reports on specific types of extensions can be produced. If the extension is an AutoAttendant, Voice Mail or Announcement extension, then setting a voice mail timeout will cause any incoming calls to this extension connected for less than the voice mail timeout to be marked
PBX Code
Head Office
Number:
206
Enable Real Time Statistics
Name:
EXT 206
Default User:
None
Select...

Now select the user in the same method as when assigning the user to the PIN number and click OK to save changes.

Creating Users Using The Config Import Tool

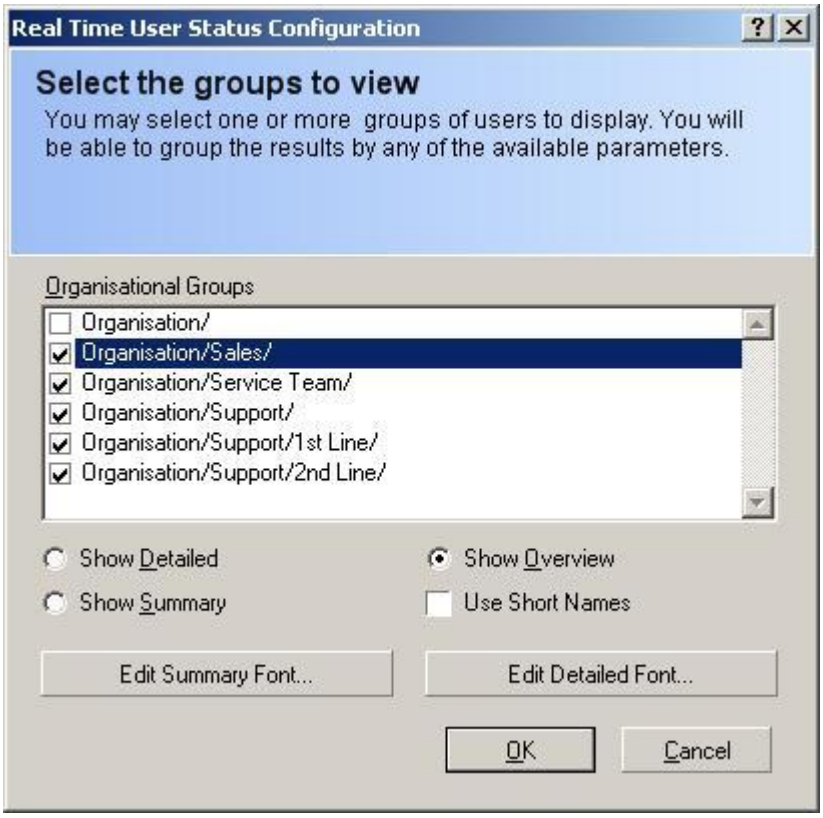
If there are numerous users to create, the Config Import Tool can be used to speed up the procedure. When using the Config Import Tool to create users on an existing installation, you should copy and paste all extensions that are used on the system. If you have existing extensions already configured extensions will be overwritten when the new configuration is imported. Other devices, such as DDI's and trunks will not be altered so long as they are not copied into the Config Import Tool. The General page will also need to be copied across.

When the extension information is pasted into the Config import tool, there is an option to 'Create Default Pins.' By clicking on this button, the extension numbers are duplicated across to the PIN field. If required, the numbers can be changed by over typing them. The same idea applies to users. Click the 'Create Default Users' button to populate the users column. The user names that are generated can be edited if required. The user role can be changed by selecting one of the options in the drop down menu in the user type column.



An Administrator user name and password have to be entered when setting up users in the Config Import Tool. Click the disk icon in the Config Import Tool to send the configuration into MyCalls. After import users using you will have to create organisation groups as required and move the newly imported users in to the appropriate groups.

To check that the user logons are working, you need to login to MyCalls and create a real time user view. From the MyCalls menu select View / Real Time Information / Real Time Status / Users / Create a New User Status View.



Select the organisation group the agent / agents belong to, choose to 'Show Overview' and click OK.

Once the user status screen is displayed, click the double arrows pointing downwards next to the user's name, this will show more detail about the agent. If the agent is logged off, their status will show as logged off.

Once the agent logs on, their status will change to show that they are available. If the Agent was already logged on when they were created in MyCalls, they will need to logoff / logon before their status will be displayed correctly.

Creating Real Time Windows

There are several different Real Time windows that can be created in MyCalls. Real Time Statistics, Single Value Windows and Combination Value Windows acts in the same way they do in a non ACD configuration. The main differences with working in an ACD environment is the Real Time Status windows, which can be used to display Agent Status and Pilot Number status in various different ways. A real time user view will show an agents status regardless of if they are logged into ACD or not. A pilot number view will show the number of calls in queue and display agents that are logged into specified ACD queue.

Real Time Status – Pilot Numbers

A real time pilot number status view will show which agents are who is logged into a pilot number and some calls in queue information. From the View menu select Real Time Status / Pilot Numbers / Queue Status / Create a New Queue Status View.

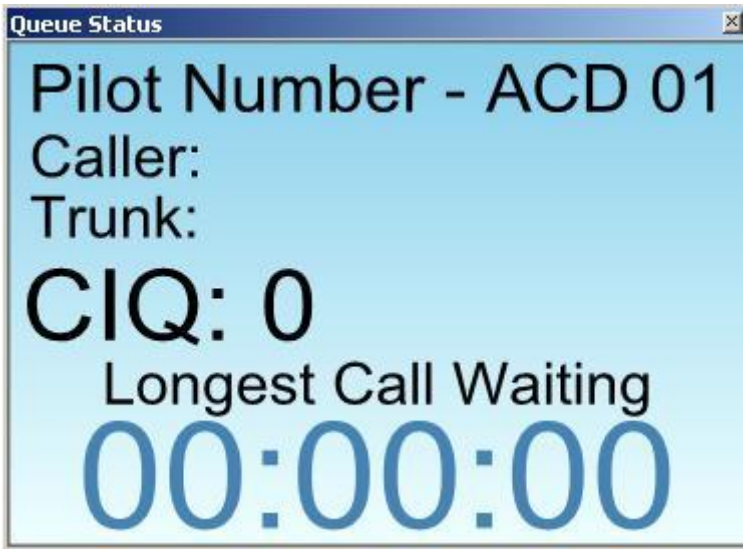
Real Time Queue Status Configuration
Select the device/group to view
The status is filtered to show only values for the type you have selected. The DID and Pilot Number status may not be available on your telephone system. Check with your maintainer for details.
PBX
Head Office
Pilot Number
ACD 01
Show Detailed
Show Summary
Show Overview
Use Short Names

Select the Pilot number you wish to create the view for and choose either a detailed, overview or summary view and click OK. A summary of the different views are as follows:

Show Detailed is a moving status window where users move around based upon which state they are in and how long they have been in that state. The number of calls in queue, Longest Wait Time (duration of the call queuing the longest in HH:MM:SS) and the CLI of the longest waiting caller. In the sample below, there are 3 users available to take calls. Agent 200 is at the top of the list because they have been in the available state the longest. If agent 200's extension was to ring with an ACD call, Agent 200 would move to the ringing column. If 5 extensions were ringing, then there would be 5 extensions in the ringing column, the call that had been ringing the longest would be at the top of the list.

Show Overview will show all agents against the selected pilot number, the agents will remain in the same place and the colour of the agent will change based upon what state they are in. If you click the double arrows next to the agent's name, more information is displayed about their status. The number of calls in queue, the longest wait time and CLI of the longest waiting caller are also displayed.

The Show Summary will display the number of calls in queue and longest wait time, no real time agent statuses are shown.



Real Time Status – Users

A user view will show the status of a user regardless of if they are logged on or not.

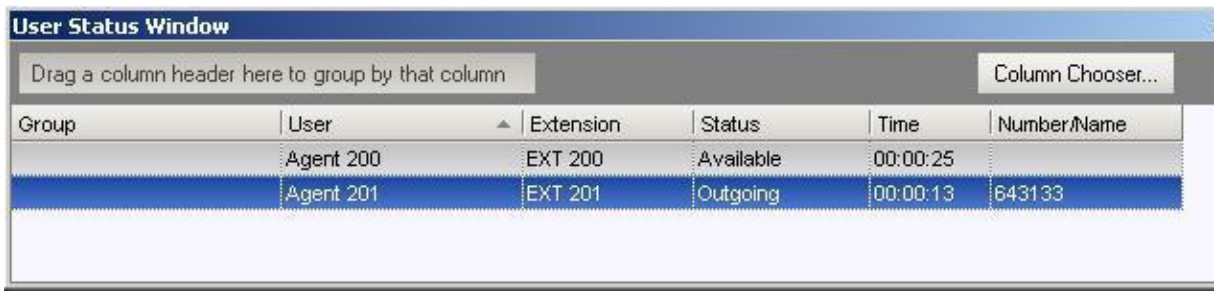
From the MyCalls menu, click View / Real Time Information / Real Time Status / Users / Create a New User Status View.

Choose which organisational group to create the user view for and choose which type of view to wish to create

Real Time User Status Configuration
Select the groups to view
You may select one or more groups of users to display. You will be able to group the results by any of the available parameters.
Organisational Groups
Organisation/
Organisation/agents/
Show Detailed
Show Overview
Show Summary
Use Short Names

The detailed and Overview views are the same as you can create against pilot numbers.

The Summary View for users is fixed grid view and displays the user's status. As the user changes status, the colour of line changes and the Status field is updated.



MyCalls Agent Control

MyCalls Agent Control uses a separate TCP Port connection to the SV8100 that allows agents and supervisors to control their ACD status using the MyCalls application. It works by sending AIC logon commands via the Agent Control TCP Port. An AIC code is created for each ACD group and when an agent requests to login to ACD groups 1, 2 and 3, MyCalls will send 3 separate commands telling the SV8100 to login the designated agent to groups 1, 2 and 3.

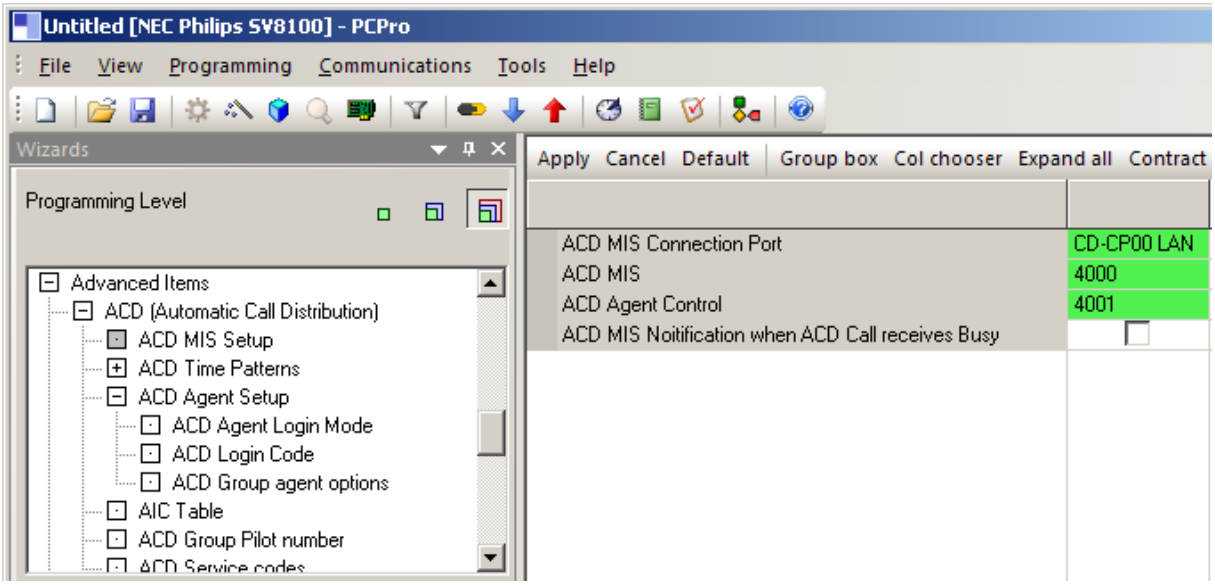
MyCalls uses ACD group 64 as a holding area for agents, if for example you login to groups 1, 2 and 3, MyCalls will first log you in to ACD group 64, then 1, 2 and 3. For this reason, the SV8100 should not be programmed to deliver any calls to ACD group 64. There is a limit on the number of times an agent can logon using AIC commands, after the agent has logged on using 16 different AIC code, they will need to logout before they will be allowed to logon to any more groups. For these reasons, an ACD agent can only logon to 15 ACD groups. It is not possible to control the status of an agent while they are on an internal call.

MyCalls Agent Control requires a valid Agent Control License.

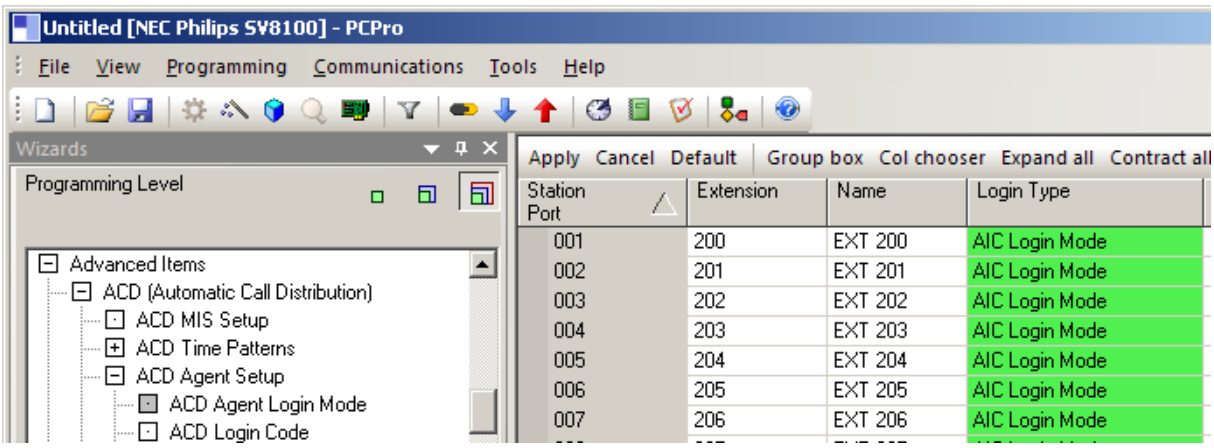
SV8100 Programming

Note: Agent Control requires system software 3 of greater

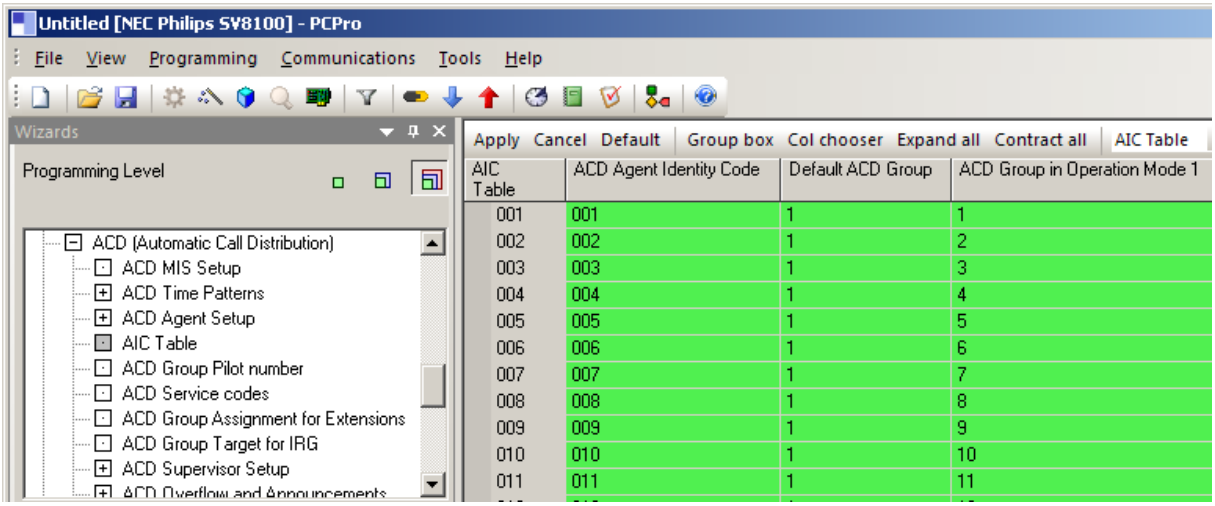
The TCP Port for Agent Control should be set in Wizards / Advanced Items / ACD / ACD MIS Setup, set ACD Agent Control TCP Port Number to 4002.



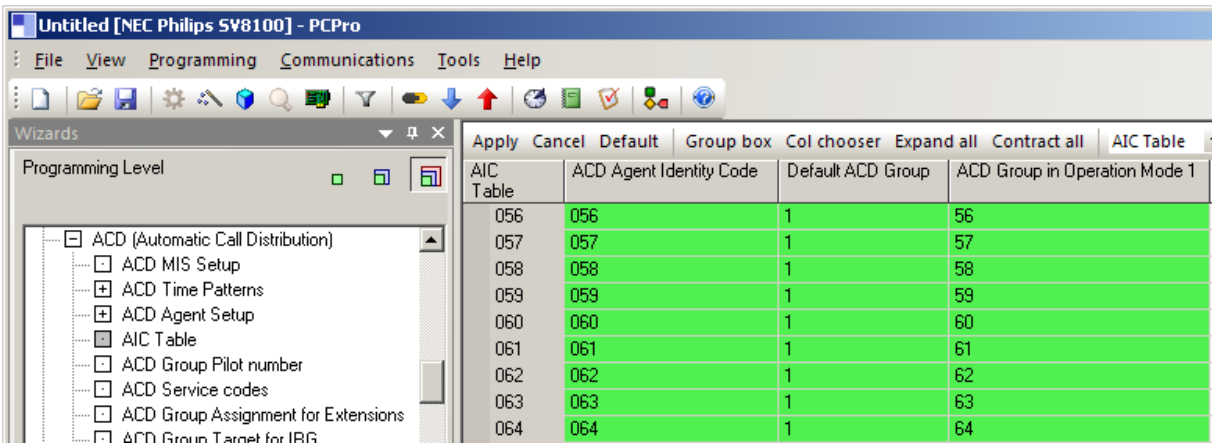
Each Agent must be set to AIC login, Wizards / Advanced Items / ACD Agent Setup / ACD Agent Log in Mode


Untitled [NEC Philips SV8100] - PCPro
File View Programming Communications Tools Help
Wizards
Programming Level
Advanced Items
ACD (Automatic Call Distribution)
ACD MIS Setup
ACD Time Patterns
ACD Agent Setup
ACD Agent Login Mode
ACD Login Code
Apply Cancel Default Group box Col chooser Expand all Contract all
Station Port
Extension
Name
Login Type
001 200 EXT 200 AIC Login Mode
002 201 EXT 201 AIC Login Mode
003 202 EXT 202 AIC Login Mode
004 203 EXT 203 AIC Login Mode
005 204 EXT 204 AIC Login Mode
006 205 EXT 205 AIC Login Mode
007 206 EXT 206 AIC Login Mode

64 sequential AIC logons needs to be created.


Untitled [NEC Philips SV8100] - PCPro
File View Programming Communications Tools Help
Wizards
Programming Level
ACD (Automatic Call Distribution)
ACD MIS Setup
ACD Time Patterns
ACD Agent Setup
AIC Table
ACD Group Pilot number
ACD Service codes
ACD Group Assignment for Extensions
ACD Group Target for IRG
ACD Supervisor Setup
Apply Cancel Default Group box Col chooser Expand all Contract all AIC Table
AIC Table
ACD Agent Identity Code
Default ACD Group
ACD Group in Operation Mode 1
001 001 1 1
002 002 1 2
003 003 1 3
004 004 1 4
005 005 1 5
006 006 1 6
007 007 1 7
008 008 1 8
009 009 1 9
010 010 1 10
011 011 1 11

AIC codes 9 – 57 should also be created.


Untitled [NEC Philips SV8100] - PCPro
File View Programming Communications Tools Help
Wizards
Programming Level
ACD (Automatic Call Distribution)
ACD MIS Setup
ACD Time Patterns
ACD Agent Setup
AIC Table
ACD Group Pilot number
ACD Service codes
ACD Group Assignment for Extensions
Apply Cancel Default Group box Col chooser Expand all Contract all AIC Table
AIC Table
ACD Agent Identity Code
Default ACD Group
ACD Group in Operation Mode 1
056 056 1 56
057 057 1 57
058 058 1 58
059 059 1 59
060 060 1 60
061 061 1 61
062 062 1 62
063 063 1 63
064 064 1 64

Its good practice to create all groups between 1 and 64 regardless are if they using all ACD groups. ACD group 64 must be created in order for agent control to function correctly.

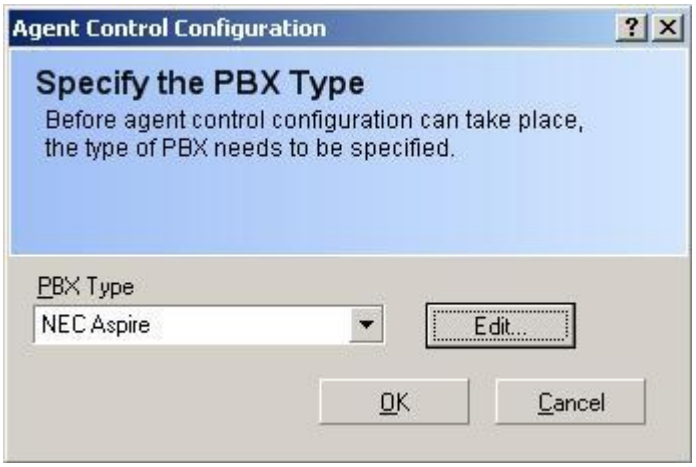
Configuring MyCalls for Agent Control

Before you can configure Agent control, you must install a valid license containing the Agent Control feature. To check if you have an agent control license, click help about in MyCalls and review the License Details. Typically on an SV8100, the license would have been gathered from the LMS (License Management Server) and installed on to the SV8100's CPU. MyCalls will then read the license from the SV8100. Refer to the MyCalls Installation manual for further details on MyCalls licensing on the SV8100.

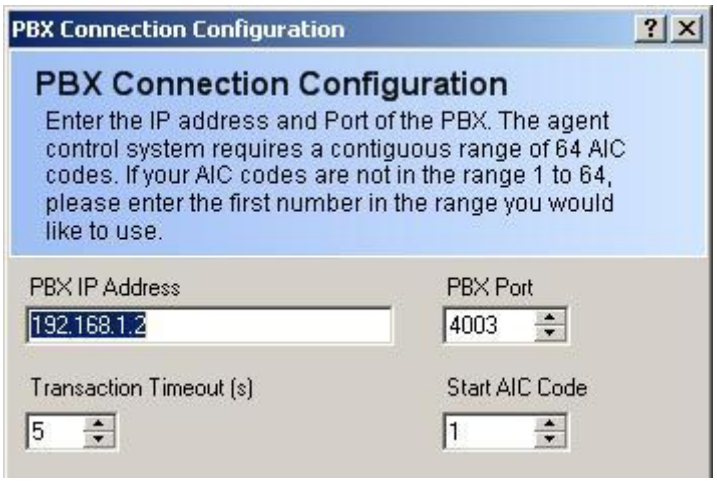
Set the Agent Control IP Address / TCP Port

From the Configure / Telephone System menu, expand your PBX and go to Agent Control / Configure Agent control

From the Agent Control Configuration screen, select the PBX Type as NEC SV8100 and click Edit

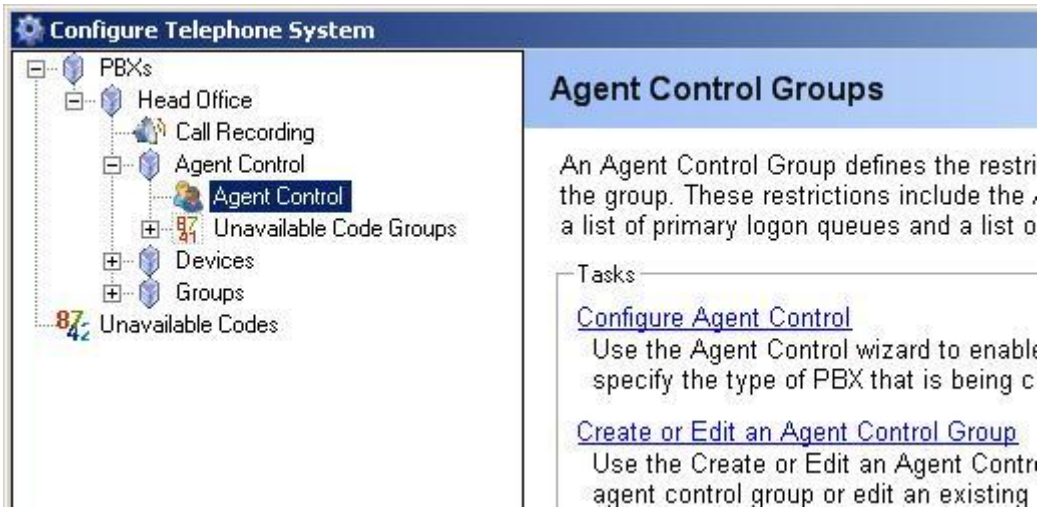


In the PBX Connection Configuration screen, enter the IP Address of the PBX and the TCP Port used for Agent Control. The transaction Timeout should be left at 5 seconds. The start AIC code is the first AIC code that was created during the SV8100 Programming, by default leave the Start AIC code at 1. If for some reason, the AIC codes have been created starting from some other code, you can change the start AIC code. If for example the AIC codes started so that AIC code 100 logged into ACD group 1, then AIC 101 logged into ACD Group 2, you would set the AIC start code to be 100. Click OK twice to save the changes, MyCalls will attempt to connect to the once you have configured this setting.


PBX Connection Configuration
PBX Connection Configuration
Enter the IP address and Port of the PBX. The agent control system requires a contiguous range of 64 AIC codes. If your AIC codes are not in the range 1 to 64, please enter the first number in the range you would like to use.
PBX IP Address
192.168.1.2
PBX Port
4003
Transaction Timeout (s)
5
Start AIC Code
1

Agent Control Groups

Agents have to be assigned to an Agent Control Group. An Agent control group is where you can give a number of agents the ability to logon to different ACD groups. If unavailable code groups have been created, they can also be assigned to the Agent Control Group. In Configure / Telephone System / Agent Control select 'Create or Edit an Agent Control Group.'

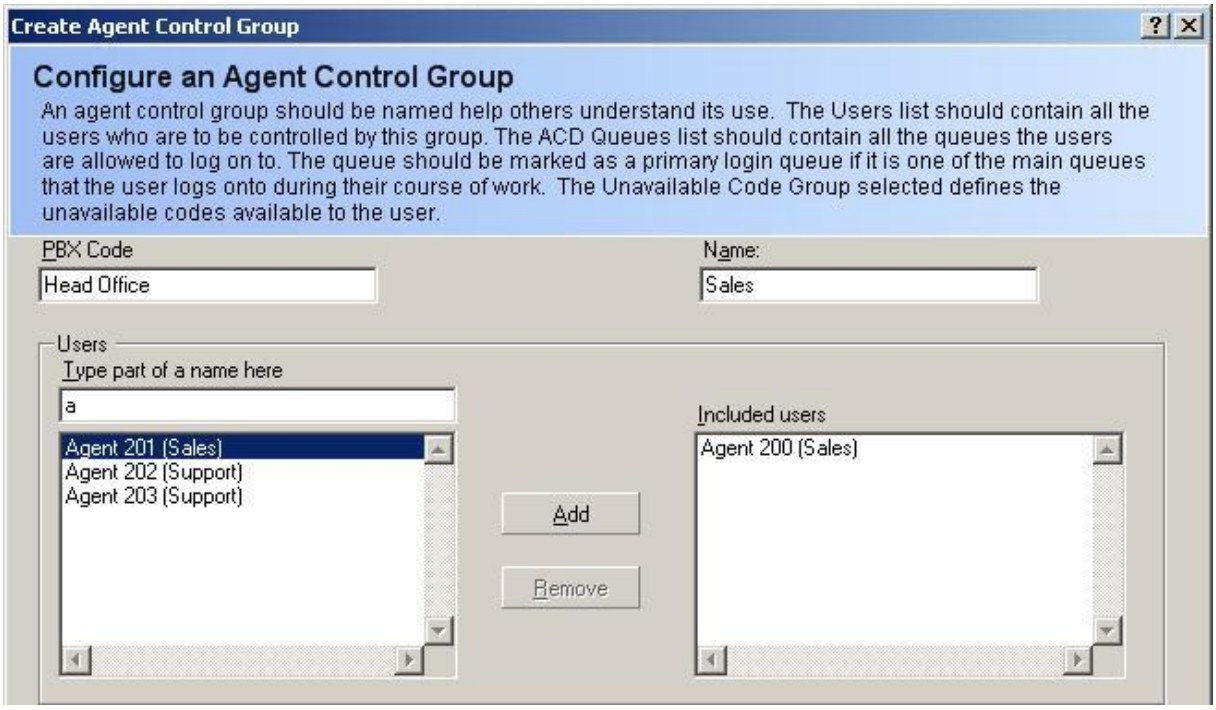

Configure Telephone System
PBXs
Head Office
Call Recording
Agent Control
Agent Control
Unavailable Code Groups
Devices
Groups
Unavailable Codes
Agent Control Groups
An Agent Control Group defines the restri
the group. These restrictions include the
a list of primary logon queues and a list o
Tasks
Configure Agent Control
Use the Agent Control wizard to enable
specify the type of PBX that is being c
Create or Edit an Agent Control Group
Use the Create or Edit an Agent Contr
agent control group or edit an existing

In the Edit Agent Control Groups, click ‘Add New Agent Control Group.’

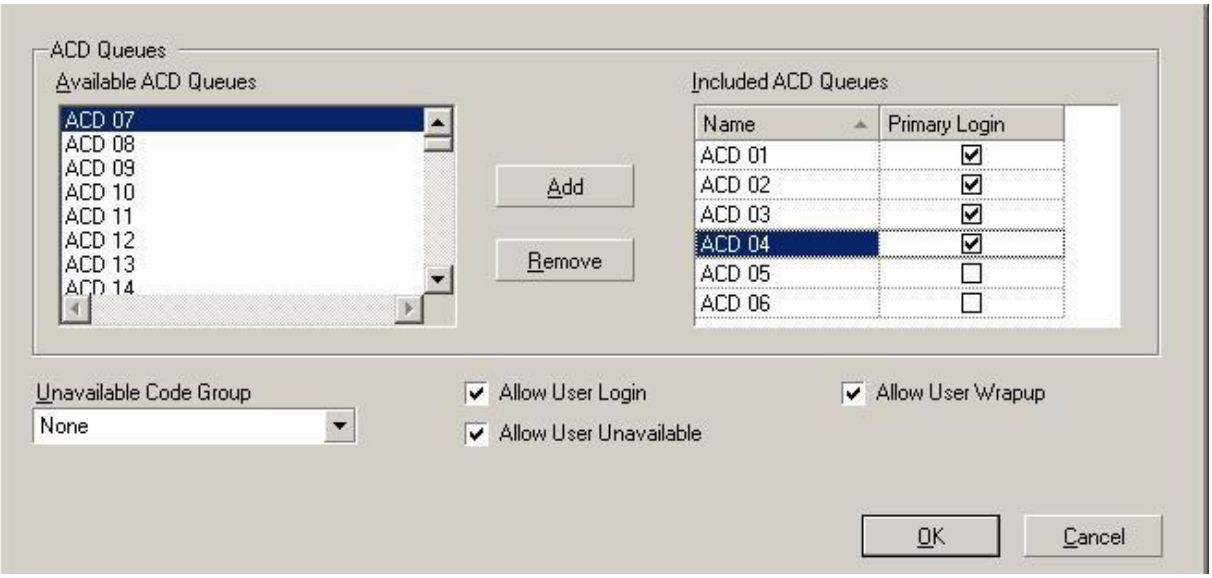
Edit Agent Control Groups
Edit the Agent Control Groups
To edit an individual agent control group click the edit button for that group.
Name
Add new agent control group...
OK
Cancel

When creating an Agent Control Group, enter a name for the group and add the users to the group. To add a user, start to type the users name in the ‘Type part of a name here’ box, select the user from the box below and click the add button. All members of the group are shown in the ‘Included users’ dialog box.

Note: An agent can only belong to one Agent Control Group.


Create Agent Control Group
Configure an Agent Control Group
An agent control group should be named help others understand its use. The Users list should contain all the users who are to be controlled by this group. The ACD Queues list should contain all the queues the users are allowed to log on to. The queue should be marked as a primary login queue if it is one of the main queues that the user logs onto during their course of work. The Unavailable Code Group selected defines the unavailable codes available to the user.
PBX Code
Head Office
Name:
Sales
Users
Type part of a name here
a
Agent 201 (Sales)
Agent 202 (Support)
Agent 203 (Support)
Add
Remove
Included users
Agent 200 (Sales)

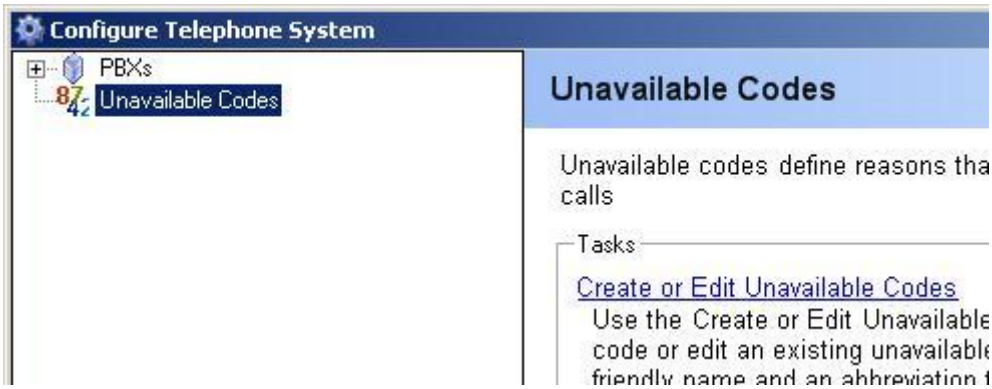
Once all the users are added to the group, in the lower section of the window, you can select which ACD groups the agent can logon to. Add the ACD queues to the included ACD queues and select if the ACD queues are a primary login or not. If an ACD queue is set as a Primary login, then when an agent clicks the login button, they are logged into all Primary login queues. The agent can then optionally login to any of the other included ACD queues.



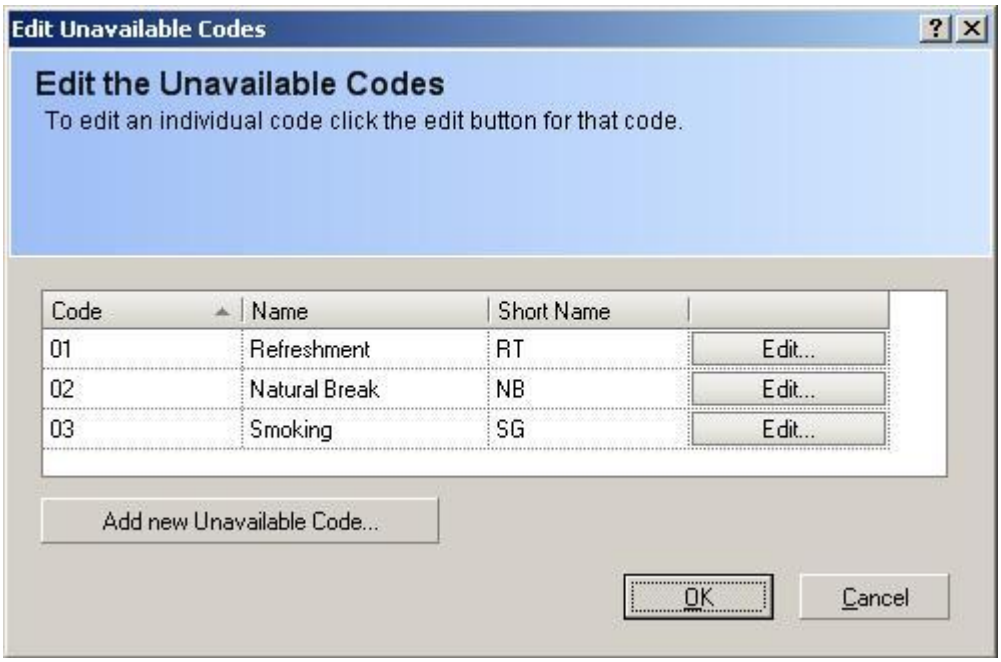
Unavailable Codes

Unavailable codes can be put into groups and assigned to Agent Control Groups. Unavailable codes allow agents to specify a reason for going unavailable. This unavailable code is displayed in real time status windows in the MyCalls application, unavailable codes can also be reported against.

To create an unavailable code group, you must first create the unavailable codes you require, go to Configure / Telephone System / Unavailable Codes. Click on create or Edit Unavailable Codes.

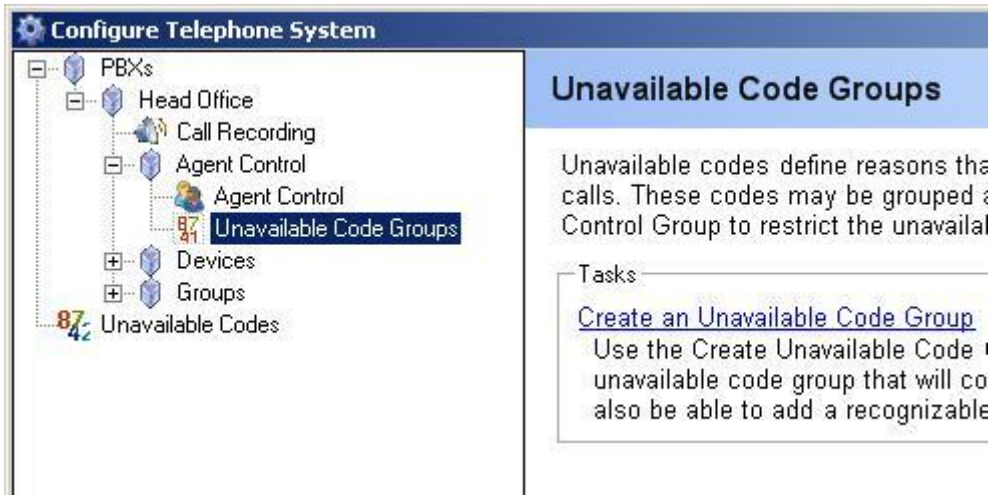


On a default installation, there 10 unavailable codes, you can add new codes as required

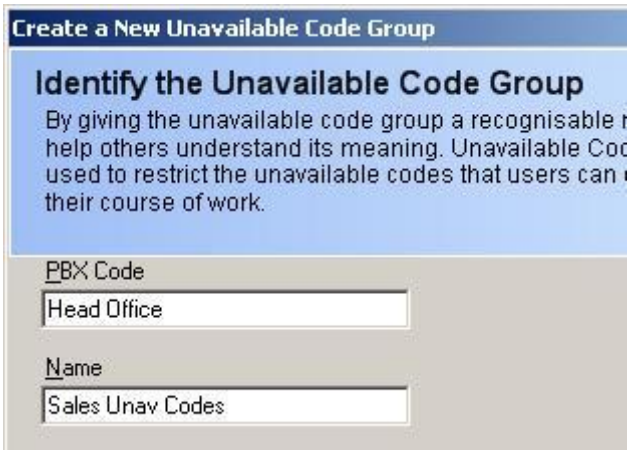


When adding a new unavailable code, enter the Code number, which is the number assigned to the code. The name is used to identify the code in MyCalls. The short name is displayed in real time user status windows when users make them selves unavailable.

Once all the required codes have been created, they have to be put into groups and assigned to an Agent Control Group. Go to Configure / Telephone System / PBX / Agent Control / Unavailable Code Groups / Create an Unavailable Code Groups and click Create an Unavailable Code Group.



Enter a name for the group and click OK.


Create a New Unavailable Code Group
Identify the Unavailable Code Group
By giving the unavailable code group a recognisable
help others understand its meaning. Unavailable Coc
used to restrict the unavailable codes that users can
their course of work.
PBX Code
Head Office
Name
Sales Unav Codes

Now navigate to the group and click Edit Unavailable Code Group Configuration.

Choose which codes will be assigned to the group by ticking the included box, click OK once you have selected all the code needed.

Now the unavailable code group has been created, it should be assigned to the appropriate Agent Control Group. Go to Agent Control / Create of Edit and Agent Control Group, select the Agent Control Group and click edit. From the drop down menu, select the Unavailable Code Group.

Create agent control groups and unavailable codes as required.

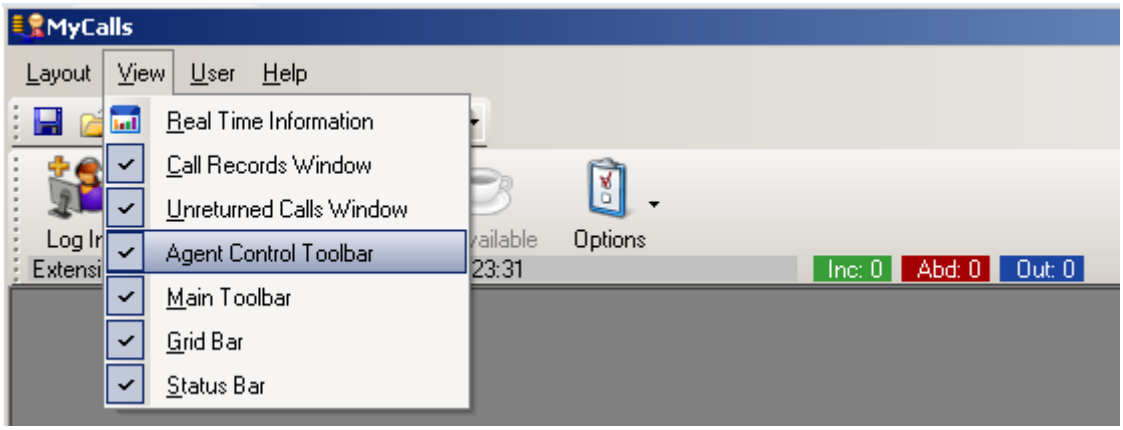
Completion Codes

Completion Codes are available in MyCalls, for details on configuring completion codes, refer to the MyCalls end user guide.

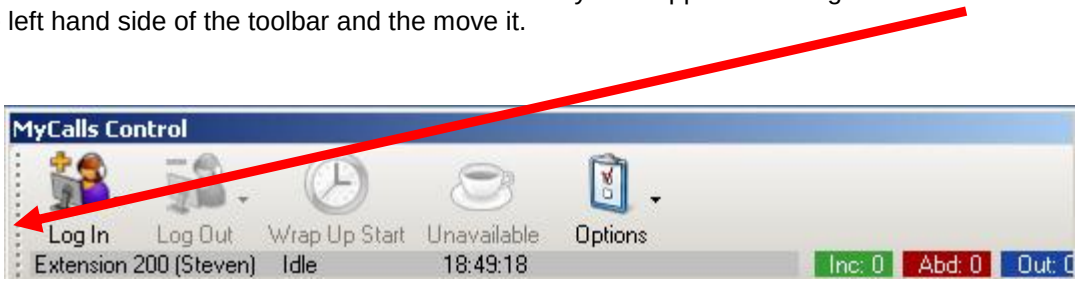
Using MyCalls Agent Control Features.

As an Agent

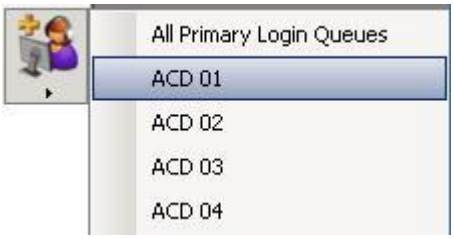
When an Agent logs in into MyCalls, they can use the Agent Control Toolbar to carry out various actions. From the view menu, check the Agent Control Toolbar option. Once visible, the Agent Control Toolbar can be moved around the application.



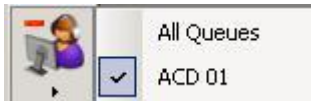
The toolbar can also be moved out of the MyCalls application and used as a free floating application. When the toolbar has been removed from the application, MyCalls can be minimised and the toolbar will still be visible. To move the toolbar out from the MyCalls application drag the dotted line situated at the left hand side of the toolbar and the move it.



The functions of each of the Agent Control Bar buttons are described as follows:



Login – Click the login button to login to all of the primary login groups associated with your Agent Control Group. Click the Arrow to be presented with a list of ACD groups available to login to. When an agent clicks the login button, they will be prompted with extension they should login to. If the user is assigned to a default extension, they can simply click ok to login to their default extension or choose an extension from the drop down menu.

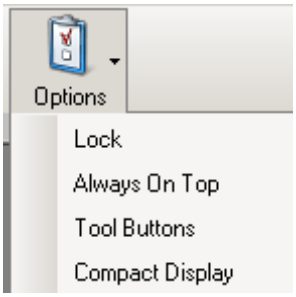


Logout – Click the logout button to logout of all ACD groups. Click the Arrow to logout of individual ACD groups.

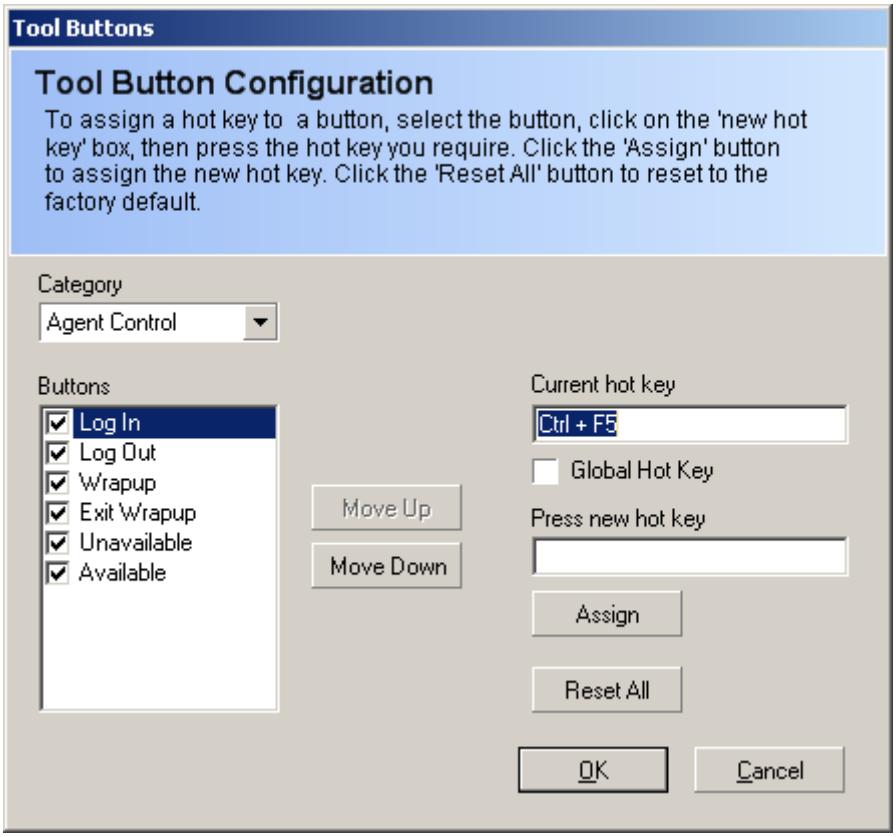
Wrap up – Click to Enter / Exit Wrap up

Unavailable – Click the arrow to choose an unavailable reason. If unavailable codes are not setup, click the icon to go unavailable.

Once logged in, an agent can close the MyCalls application down and they will stay logged into their ACD groups.



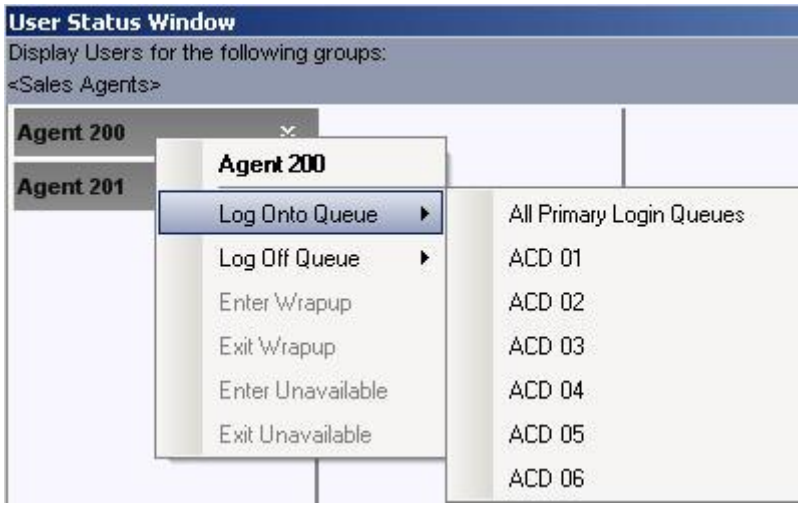
Options – Click the options button to view the list of available options:
Lock – Will stop the toolbar stop a user from being able to move the toolbar.
Always on Top – If always on top is selected, the toolbar will always sit visible in the screen. If other applications are running, the toolbar will sit on top of those applications.
Compact Display – Select to reduce the size of the icons that are shown in the agent control toolbar.
Tool Buttons – Click to add and remove buttons from the agent control toolbar and change the order in which they appear. Hot Keys can be assigned to the buttons, for example, the default hot key for Login is Ctrl + F5. To change the hotkey, click in the 'Press new hot key' box and press the new key sequence that should be used as the hot key. If you enable the 'Global Hot Key' option then if the Hot Keys will work even if the MyCalls application is not running in the foreground.



As An ACD Supervisor

An ACD Supervisor has the ability to view real time user status and pilot number status and change the status of agents. They can also run reports.

In the view / real time information / real time status / users menu, choose to 'Create a New User Status View.' Choose an Organisation group, select overview and click OK. Right click on any Agent and you will be able change their status. For an Agent that is not logged in, you have the option to login the Agent to either their Primary Login Queues or any individual queues assigned to the Agent.



Once an Agent is logged in, you can control their Agent status further. You can put the agent in a wrap up state or an unavailable state. If unavailable codes are being used, you can specify an unavailable reason from the list.

The logon / logoff options can be used to login / logout of individual groups.

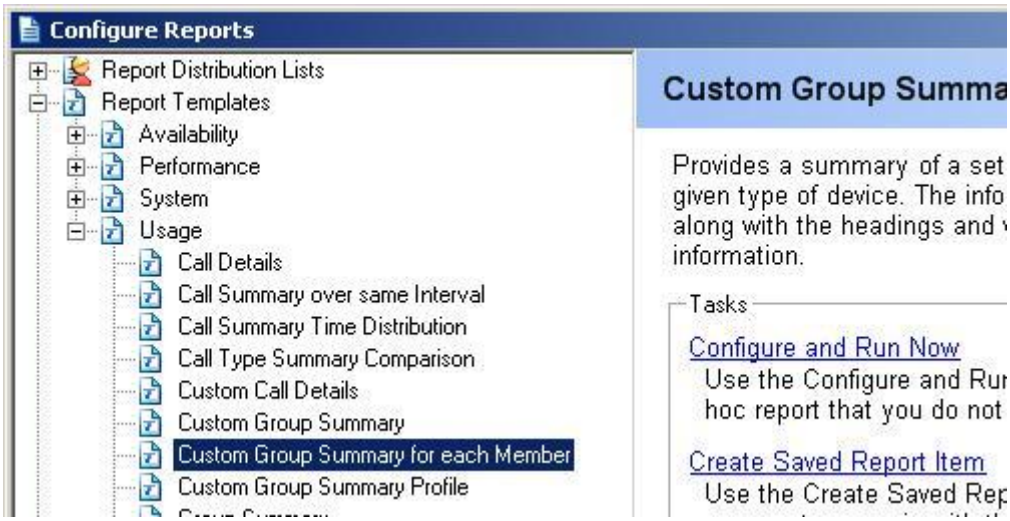
Call Centre Reporting

With MyCalls Call Centre you can produce reports based around users (agents) or pilot numbers (ACD groups.) When running reports you should filter be either pilot number of organisation group. When reporting against Agents, if essential that agent login and logout each day. MyCalls will calculate how long an agent has been logged in by looking at when an agent first logged in and when they last logged out. If an agent was still logged in when the report is run then the statistics may not be correct.

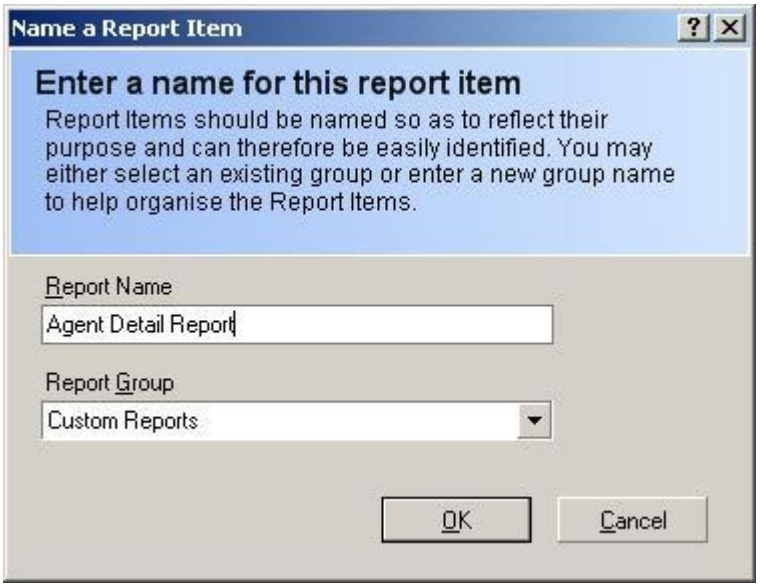
Sample Agent Activity Report.

To create an Agent Activity Report that will show Agent based stats, carry out the following instructions.

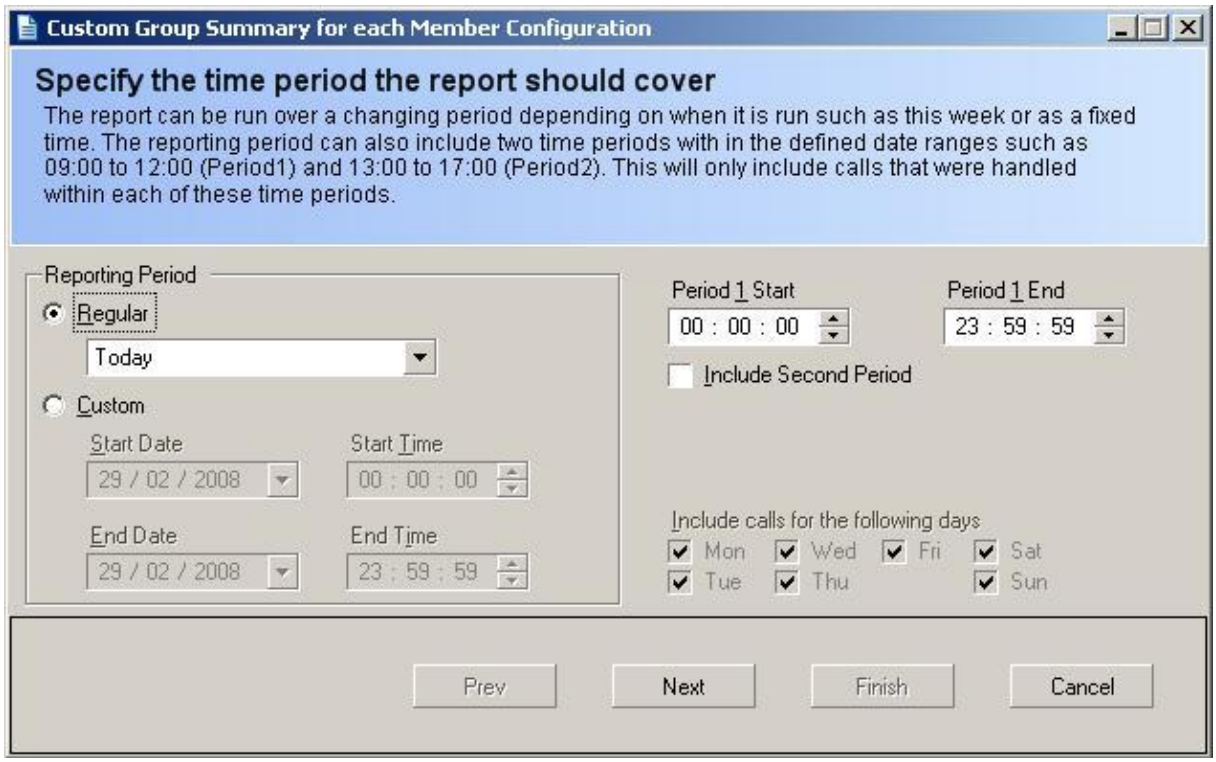
From MyCalls, click Reports / Reports / Report Templates / Usage / Custom Group Summary for each Member / Create Saved Report Item.



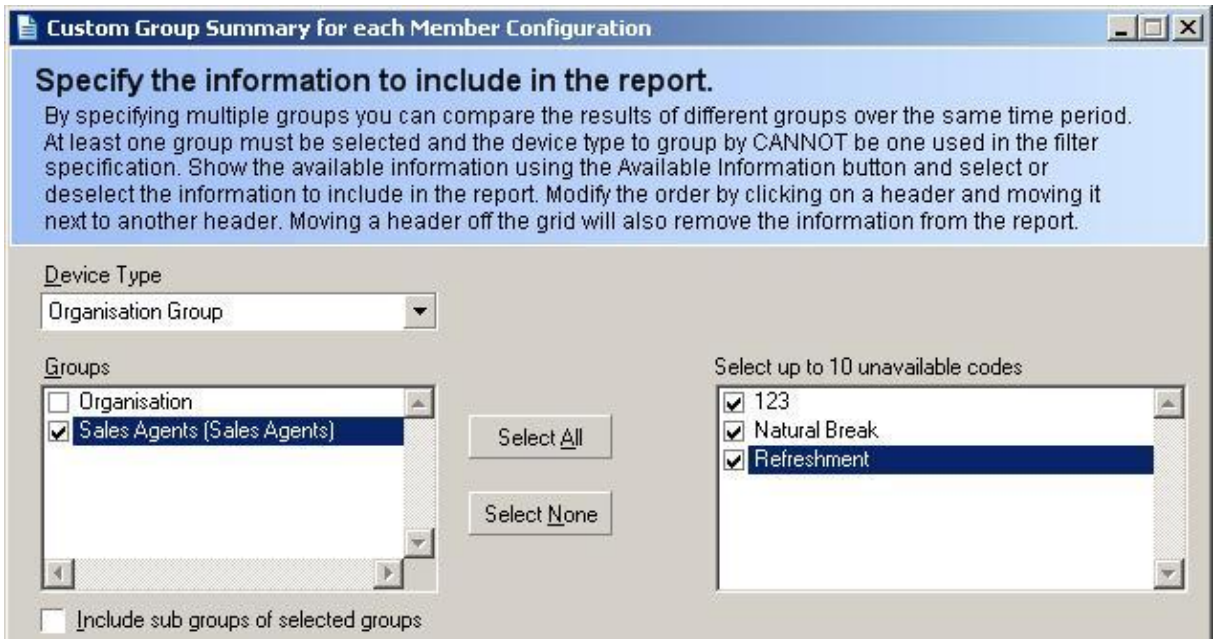
Enter a name for the report, select a Report Group and click OK.


Name a Report Item
Enter a name for this report item
Report Items should be named so as to reflect their purpose and can therefore be easily identified. You may either select an existing group or enter a new group name to help organise the Report Items.
Report Name
Agent Detail Report
Report Group
Custom Reports
OK
Cancel

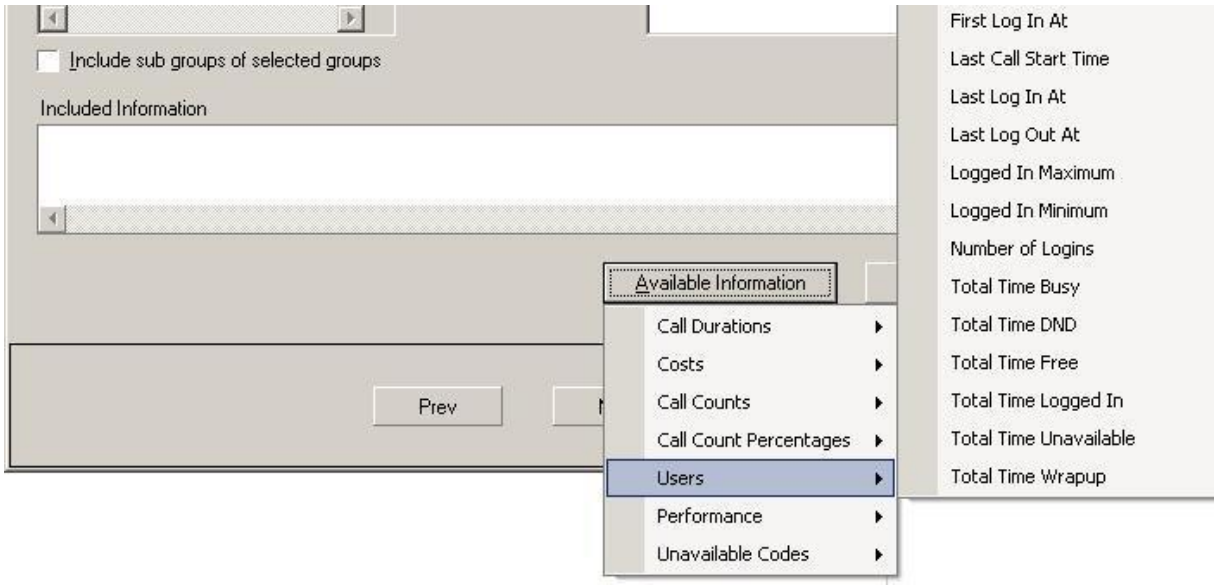
The report wizard will start, the first step of the wizard is to configure the reporting period. Choose the period the report will run for and click next.


Custom Group Summary for each Member Configuration
Specify the time period the report should cover
The report can be run over a changing period depending on when it is run such as this week or as a fixed time. The reporting period can also include two time periods with in the defined date ranges such as 09:00 to 12:00 (Period1) and 13:00 to 17:00 (Period2). This will only include calls that were handled within each of these time periods.
Reporting Period
Regular
Today
Custom
Start Date
29 / 02 / 2008
Start Time
00 : 00 : 00
End Date
29 / 02 / 2008
End Time
23 : 59 : 59
Period 1 Start
00 : 00 : 00
Period 1 End
23 : 59 : 59
Include Second Period
Include calls for the following days
Mon
Tue
Wed
Thu
Fri
Sat
Sun
Prev
Next
Finish
Cancel

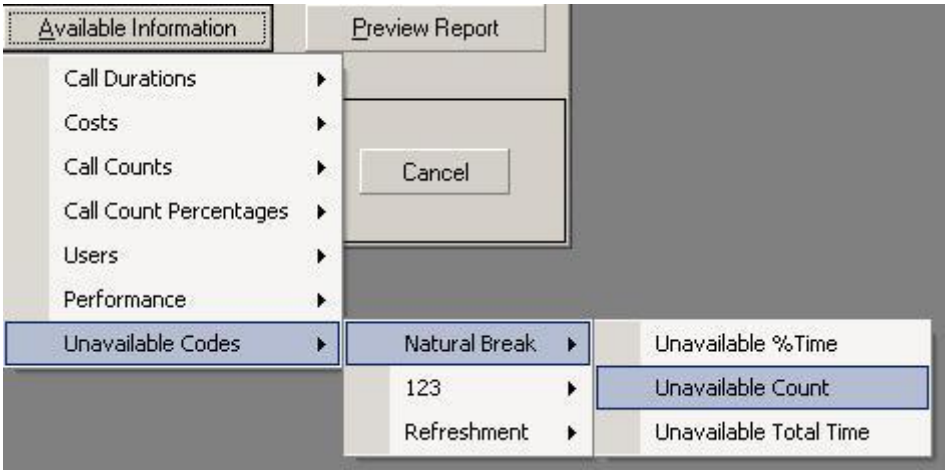
From the upper section of the Custom Group Summary for each Member Configuration, select the Device Type as Organisation Group and choose which group the report will be for. If you wish to report against Unavailable Code, then select which code will be included in the reports. Only 10 unavailable codes can be reported against in a single report.


Custom Group Summary for each Member Configuration
Specify the information to include in the report.
By specifying multiple groups you can compare the results of different groups over the same time period. At least one group must be selected and the device type to group by CANNOT be one used in the filter specification. Show the available information using the Available Information button and select or deselect the information to include in the report. Modify the order by clicking on a header and moving it next to another header. Moving a header off the grid will also remove the information from the report.
Device Type
Organisation Group
Groups
Organisation
Sales Agents (Sales Agents)
Select All
Select None
Select up to 10 unavailable codes
123
Natural Break
Refreshment
Include sub groups of selected groups

In the lower section of the configuration screen, click Available Information / Users. From the Users menu, select items as required, examples are First Login at, Last Logout at, Total Time Logged In.



To include Unavailable codes in the report, click Unavailable Codes and you will be presented with a sub menu displaying the Unavailable codes selected in the upper section of the report configuration screen. Under each unavailable code, you can select Unavailable % Time, Count of Total Time. % Time will show the percentage of time your have been unavailable in that particular unavailable code. Count will display the number of time you have been unavailable for that reason. Total Time will display the total time you have been unavailable in that code.



Other items can be included in the reports from the available menus. Each of the categories are described as follows:

Call Durations / General – Call durations can be used to display items such as based around the duration of calls. For example you could display the total amount of time an agent been on an incoming or outgoing call. Average Calls Durations can also be displayed as well as Ring no Answer Times.

Costs / General – If call costing, fixed costs or handling costs are being used, these can be included by selecting items from the Costs menu.

Call Counts / General - Call counts will display statistic such as the number of incoming calls or outgoing calls

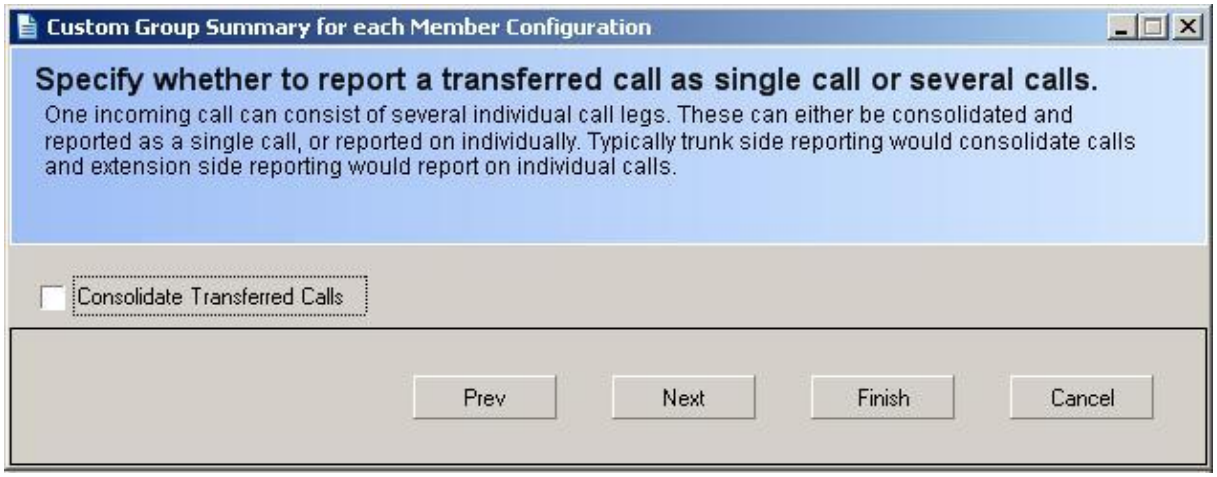
Call Count Percentages – Will display the number of calls as a percentage, available for different call types.

Users – Agent based statistics.

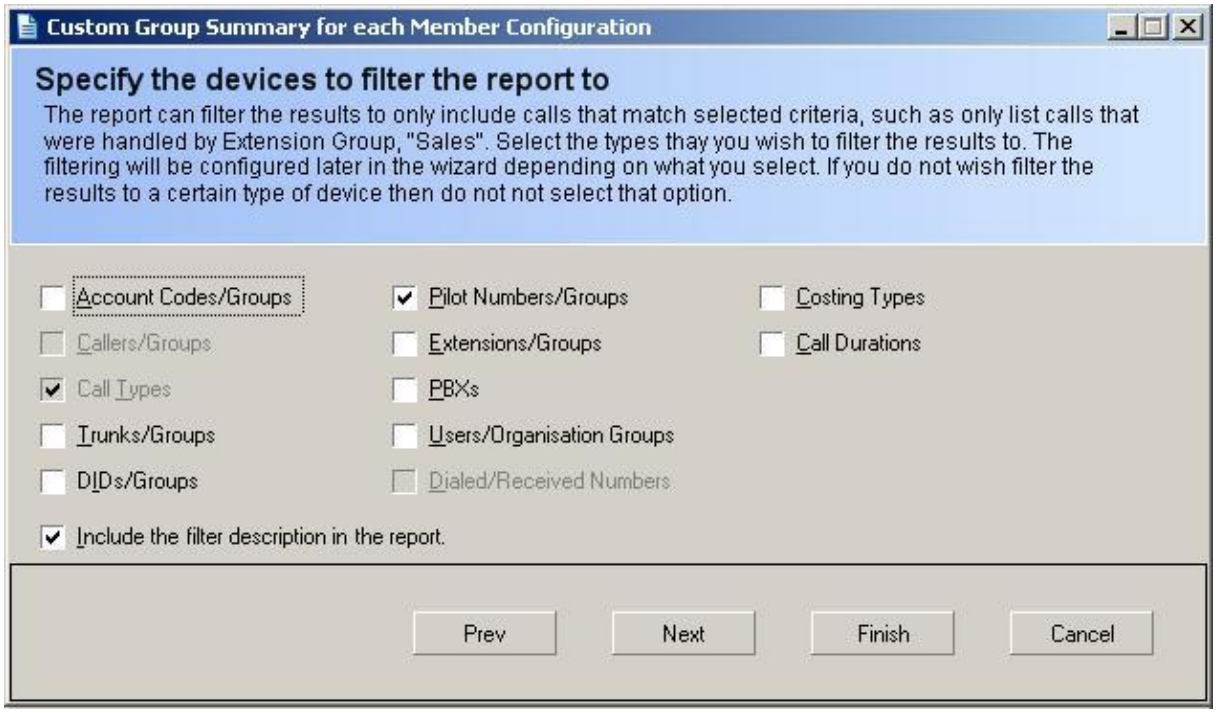
Performance – Used to Display Grade of Service values.

Unavailable Codes – Used to display statistics on unavailable codes.

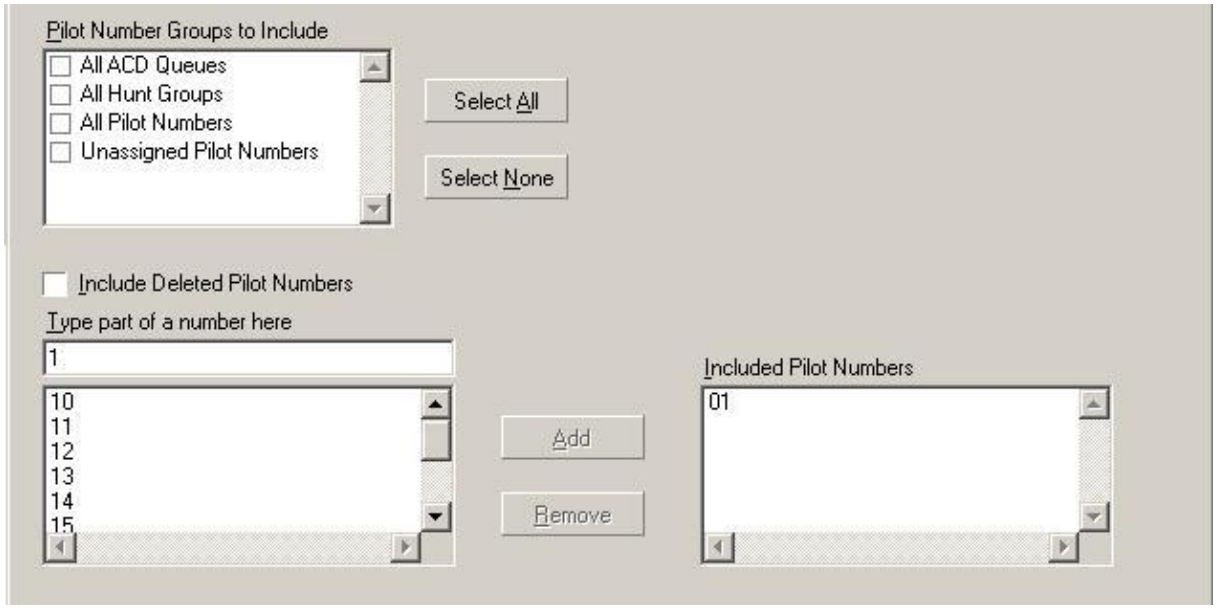
Once you have selected the fields that should be included in the report, click next. Choose is to consolidate transferred calls or not and click next.


Custom Group Summary for each Member Configuration
Specify whether to report a transferred call as single call or several calls.
One incoming call can consist of several individual call legs. These can either be consolidated and reported as a single call, or reported on individually. Typically trunk side reporting would consolidate calls and extension side reporting would report on individual calls.
Consolidate Transferred Calls
Prev
Next
Finish
Cancel

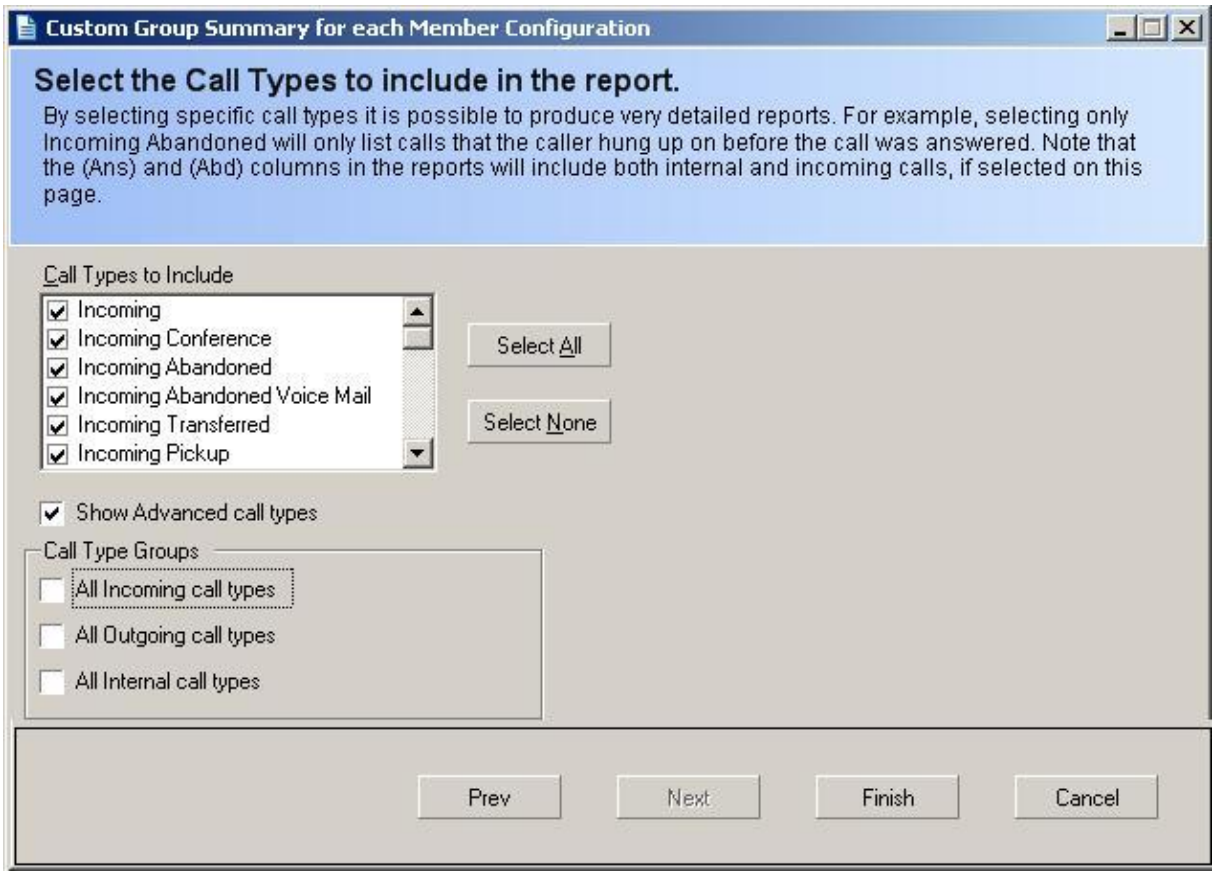
At the filter page, you can be more specific about the calls that are included in the report. By default without and filtering all calls from all DDI's / Pilot numbers are included. To only include calls from a specific Pilot Number, tick the Pilot Numbers / Groups check box. When you click next you will have the option to specify which Pilot Numbers you want to report against. Optionally you can filter by any of the other options.


Custom Group Summary for each Member Configuration
Specify the devices to filter the report to
The report can filter the results to only include calls that match selected criteria, such as only list calls that were handled by Extension Group, "Sales". Select the types thay you wish to filter the results to. The filtering will be configured later in the wizard depending on what you select. If you do not wish filter the results to a certain type of device then do not not select that option.
Account Codes/Groups
Pilot Numbers/Groups
Costing Types
Callers/Groups
Extensions/Groups
Call Durations
Call Types
PBXs
Trunks/Groups
Users/Organisation Groups
DIDs/Groups
Dialed/Received Numbers
Include the filter description in the report.
Prev
Next
Finish
Cancel

If you selected to filter by a pilot number, then either select the a pilot number group from the list of Pilot Number Groups to Include, or select individual pilot number from the lower configuration section of the screen and click next.



The final step in creating the report is to choose what call types are included in the report. Select the call type as required and click finish.


Custom Group Summary for each Member Configuration
Select the Call Types to include in the report.
By selecting specific call types it is possible to produce very detailed reports. For example, selecting only Incoming Abandoned will only list calls that the caller hung up on before the call was answered. Note that the (Ans) and (Abd) columns in the reports will include both internal and incoming calls, if selected on this page.
Call Types to Include
Incoming
Incoming Conference
Incoming Abandoned
Incoming Abandoned Voice Mail
Incoming Transferred
Incoming Pickup
Select All
Select None
Show Advanced call types
Call Type Groups
All Incoming call types
All Outgoing call types
All Internal call types
Prev
Next
Finish
Cancel

To run the report, go to Report Item / *Report Group* / choose the report and click run.

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